DIGITAL ORGANIZATION

TO KEEP YOU & YOUR FAMILY ORGANIZED

Hello!

I'm Shanice Bannis, an organizing expert and the creative mind behind City of Creative Dreams. I'm also the founder of Inspired by Organizing, where I offer custom e-design organizing services.

I've always had a passion for organization, which led me to start my blog when I became a mom. It began as a way to transform my apartment and quickly became a resource for my audience to organize various aspects of life.

Along the way, I faced the challenge of getting my family on board with my vision for the organization. I learned that adapting to our unique home and routines was key to success.

Since 2013, I have been making others (*like you*) lives a little easier by helping them take control of their household by removing clutter, mastering their time and simplifying their lives.

That is why I am deeply honoured to have you enjoy this guide and customized printables collections. I hope this gives you a helping hand in your already incredibly awesome life!

"It is all about the imperfectly perfect organizing journey, which means that some tips will work for you and some will not and that is okay. I am all about making it your own and customizing it to your journey of who you are today and where you are today. "

Shanice

Founder, City of Creative Dreams & Inspired By Organizing
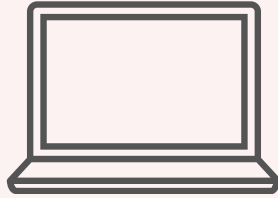
BEST PRACTICES FOR USING DIGITAL TOOLS EFFECTIVELY

"DO THE BEST YOU CAN. IF A DIGITAL TOOL IS NOT RIGHT FOR YOU, IT WON'T WORK FOR YOU. IT WILL WORK AGAINST YOU."

-Shanice

SET CLEAR GOALS

What is your goal for this project or task? Defining that is the foundation for creating achievable goals for your tasks and projects. When you have a specific goal, it helps you prioritize your time and efforts in the best way possible.

PRIORITIZE TASKS

Now that you have a goal, you can assign tasks. This is where you can use digital tools to help you categorize tasks based on their urgency and importance. By doing this you can set clear goals for the day and focus on what matters most.

BREAK DOWN TASKS

Avoid overwhelming yourself with large projects. It is best to divide large projects into smaller, manageable tasks. This makes the work less overwhelming. Plus it allows you to track your progress much easier.

USE CALENDARS & SCHEDULING

Digital calendars are a great asset to schedule tasks and appointments. But you can also use calendars to set reminders and time blocks. It is like having your private assistant.

SET TIME BLOCKS

You can assign specific time periods to focus on tasks for specific projects in your life. You might use this for your personal "*administrative day*" where you are tackling tasks you have been needing to get to like paying bills, filling out forms or catching up on your emails.

AUTOMATE REPETITIVE TASKS

Look for automation features within digital tools like Asana or events on your calendar to handle routine tasks. This can include automating emails, task assignments, or notifications. Also, you can use it to remind yourself to drink water or have your vitamins.

KEEP TOOLS ORGANIZED

Yes, digital tools help you be organized but you also need to keep your digital tools organized. It's all about maintaining a clear file structure, naming projects or categories, and even adding labels to quickly find and access information.

REGULARLY REVIEW & STAY UPDATED

You need to review your usage regularly. Ask yourself if you are still using this app, if it no longer helps you in your life, don't allow it to collect dust, <u>uninstall it</u>. There are plenty of apps out there that suit your style. For the ones you love using, make sure you are up to date with the latest software upgrades & features.
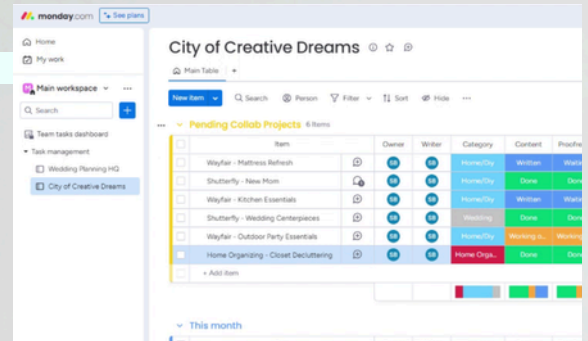
TASK MANAGEMENT & TO-DO LISTS

TASK-MANAGING APPS

Here are three apps that I have personally tried in my life to help you decide on a task-managing app that best works for your life:

MONDAY.COM

Monday.com is a platform for managing projects, and tasks. Their platform offers a visual and customizable approach to organizing your tasks and streamlining your workflow. They have paid & free options.
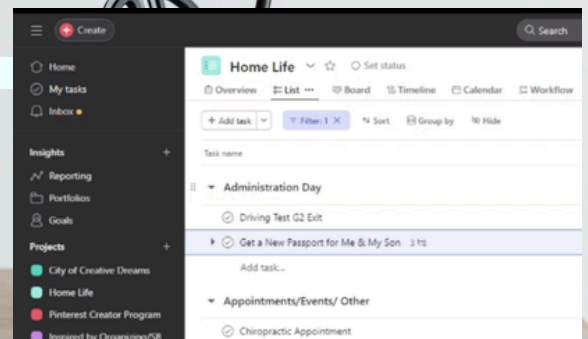
TRELLO

Trello is a visual task management tool that uses boards and cards for organizing projects and tasks. If you like putting sticky notes on the wall to organize you might like using this.
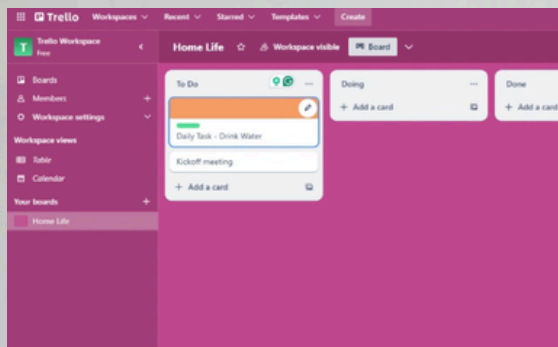
ASANA

Asana is a project management tool that helps teams and individuals manage tasks. They also have a free and paid opinions.

HOW TO USE ASANA

Once you have created your Asana account, whether through the website or the app, you can choose whether you're using Asana for work, personal use, or both.

STEP ONE

SET UP WORKSPACES & PROJECTS

First, you are going to create a workspace. This will organize different areas of your life. Within a workspace, create projects to categorize tasks (e.g., *"Household Chores"* "Home Renovation," "Family Vacation Planning,").

STEP TWO

ADD TASKS

Within each project, this is where you are going to add tasks you need to complete. Include task names and any details, such as *due dates* and *reminders* to help you stay on track, priorities & subtasks to break down bigger projects, and any notes or upload attachments you might need for this task.

STEP THREE

ASSIGN TASKS

For the free version, you can only assign yourself however, for the paid version you can assign tasks to specific family members and they will be notified of their tasks.

TO DO LIST

ONE STEP AT A TIME. YOU'LL GET THERE

MUST DO TASKS

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IF I HAVE TIME TASKS

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FOR TOMORROW TASKS

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CALENDAR & SCHEDULING

CALENDAR & SCHEDULING SITES

Here are two calendar apps and sites to consider if you are considering moving from your planner or wall calendar or want a more central digital calendar for your entire family:

OUTLOOK CALENDAR

Microsoft Outlook is a great option especially if you are using this for your emails already. You can use this calendar to schedule and organize your life but also create and manage multiple calendars within Outlook for different aspects of your life (e.g., work, personal). It is also perfect to use for integrating with Teams, other Office apps, Zoom and even Google Calendar.
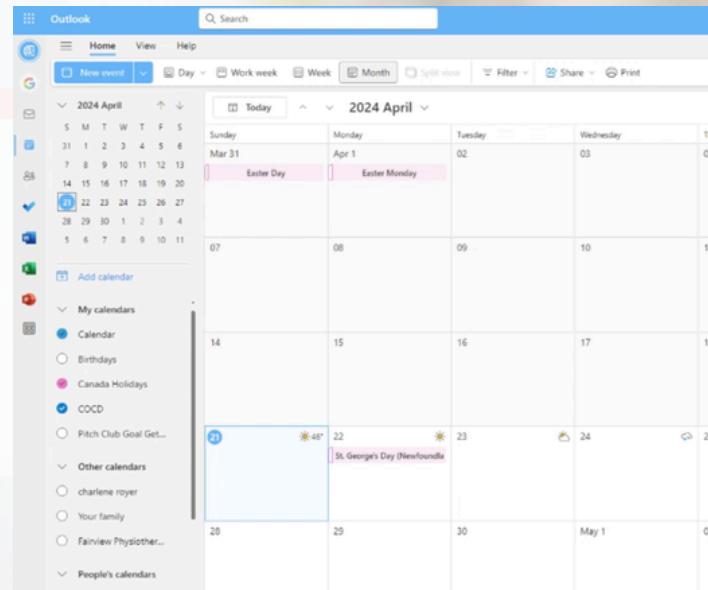
GOOGLE CALENDAR

Google Calendar is a commonly used calendar app especially if you have a Gmail account. You have a variety of options on how you can manage multiple calendars and can even overlay multiple calendars to see all events. Lastly, you can use it with Gmail, Google Drive, Google Meet, Zoom, Microsoft Teams, and Trello.
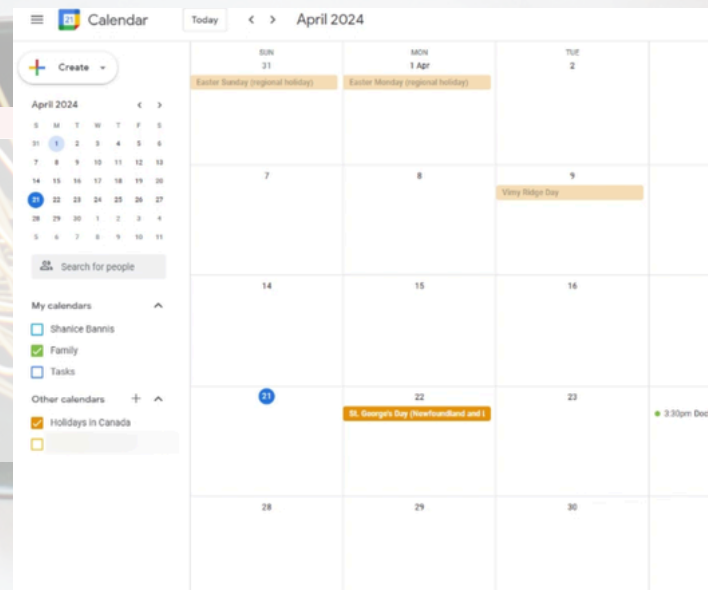
HOW TO USE GOOGLE CALENDAR

Here is how you can manage your schedule, appointments, and events:

1   CREATE AN EVENT

Once you have accessed your Google account through the website or the app it is time to create an event by clicking on the desired **date** and **time** in your calendar. This is where you are going to add details such as the **event title, location, start** and **end times**, and **description**. If you want, you can add a reminder to your event to receive notifications ahead of time or you can also invite others to this calendar event.

2   CREATE RECURRING EVENTS

For those who have places to go, events or something they want to remind themselves to do regularly, you can set these items to repeat on a regular schedule such as **weekly meetings, your family's weekly activities, or monthly reminders**. That way you don't have to input this information weekly because you would have to customize the recurrence pattern and end date to meet your needs ahead of time.

3   USE MULTIPLE CALENDARS

Have multiple calendars for different aspects of your life such as **work, personal or family**. What I like is that you can toggle calendars on and off for a clear view of specific events. You can **assign colours to events or calendars** for easy visual organization. For example: I find it helps you to see the different types of events and appointments but also to see who the event is for therefore I assigned colours for events/ appointments that are for my husband, my son or for me.

4   SHARE CALENDARS

Google Calendar can be your family's digital center point of what is going on in your lives, so it is important to share the calendar with them. It helps to coordinate schedules and availability so we are all on the same page. All you need to do is **set permissions to control who can view or edit your calendar**. If your family all have different calendar preferences you can **sync your Google calendar to other calendar services like Outlook or iCal** to keep all your schedules in one place.
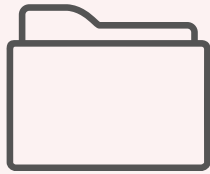
FILE MANAGEMENT & CLOUD STORAGE

# FILE MANAGEMENT & CLOUD STORAGE SITES/APPS

Here are three apps and sites that I have used in my life that you might want to consider:

GOOGLE DRIVE

Google Drive is a cloud storage service that allows you to store, share, & collaborate on files. You get:
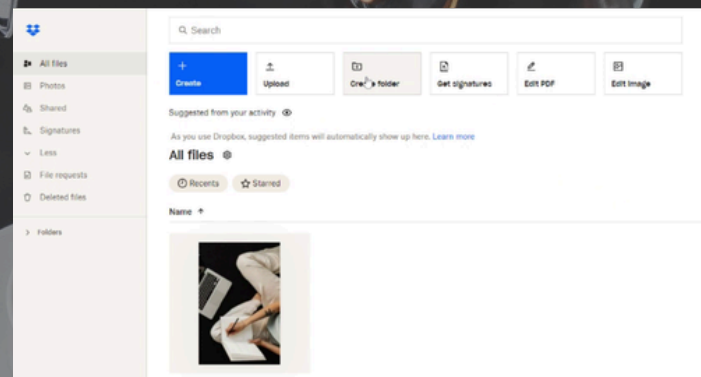- 15GB of free storage for storing files, documents, photos, and more.
- The option of purchasing additional storage space.
- Intergation with Google Docs, Sheets, Slides, and Forms.
- Automatic saved previous versions of files.
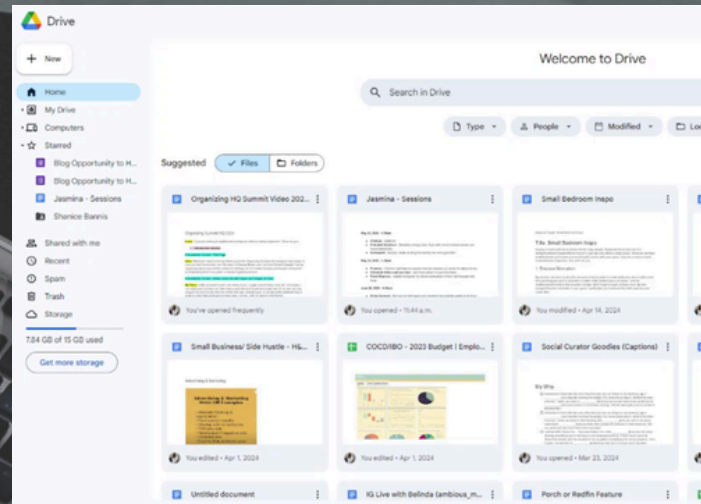
DROPBOX

Dropbox is a very easy-to-use program for uploading, downloading, & sharing files. You get:
- 2 GB of storage for the free version
- Upgrade to the paid version if you need more storage.
- Integration with Microsoft Office, Google Workspace, Slack, and Zoom.

MICROSOFT ONEDRIVE

Microsoft's OneDrive has been my preferred option for cloud storage service because I mostly use other Microsoft tools. You get:
- 5 GB of free storage for storing files, documents, photos, and more.
- Paid version if you require more space.
- Option to sync your photo gallery to OneDrive to save phone storage space.
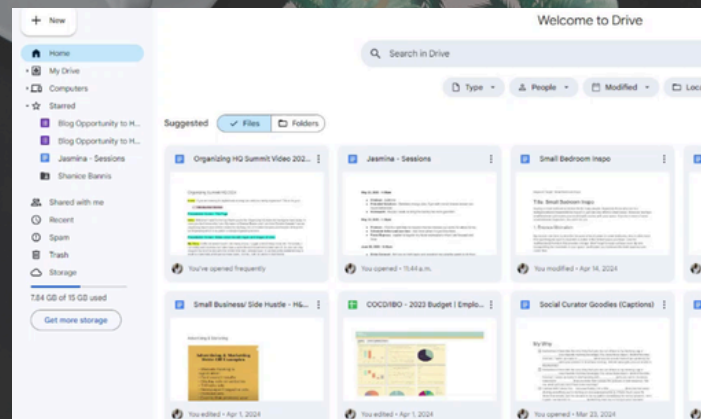
HOW TO USE ONEDRIVE

UPLOAD FILES & FOLDERS

Once you access OneDrive through a website or app. It may be slightly different depending on what device you are using however you are going to click "*Upload*" to add files or folders.

ORGANIZE FILES & FOLDERS

Create folders to organize your files into categories. This is where you are going to take the time to *rename, move, or delete files and folders* as needed.

You can start by *creating a folder structure* that best suits your life to organize your files logically. Use those as broad categories or top-level folders so that you can *subdivide them into more specific subfolders* as needed.

Choose folder names that clearly describe the contents of the folder. You don't want to name it "Miscellaneous" or "Stuff" because it is harder to tell what is in that folder.

Set aside time to review and declutter your digital files. Use this time to delete or archive outdated or unnecessary files.

ORGANIZE PHOTOS

You can *sync your phone photo gallery to OneDrive* so that your photos are never lost and you also have access to it on any of your devices. This means that in the photo gallery's settings, you can choose to sync your photos to your OneDrive instead of on your phone itself.

There is a separate section dedicated to your photos to use or you can create albums. You can *organize them in files or albums by location, person, or date to group related photos together*.

DIGITAL FILE ORGANIZATION

CHECKLIST

ESTABLISH FOLDER STRUCTURE

○ Create top-level folders for main categories (e.g., Work, Personal, Projects).

○ Subdivide folders into subfolders for further organization (e.g., Work > Clients, Personal > Finances, Projects > Project Name).

○ Consider organizing folders chronologically, alphabetically, or by topic for easy navigation.

DEVELOP FILE NAMES

○ Use descriptive file names that clearly convey the contents of the file.

○ Include relevant keywords, dates, or project names in file names for easy identification.

○ Incorporate dates or version numbers into file names to track revisions.

CATEGORIZE & TAG FILES

○ Assign tags or labels to files to categorize them based on themes, topics, or projects.

○ Use metadata or attributes to add additional information to files for easy searching and sorting.

○ Group similar files together within folders and subfolders to facilitate organization.

BACKUP & SYNC FILES

○ Find a reliable backup system to protect your digital files from loss or corruption.

○ Backup files regularly to an external hard drive, cloud storage, or a secure location.

○ Enable automatic sync to ensure files are updated across all devices and platforms.

DOCUMENT MANAGEMENT

○ Create a central document repository for important documents and files.

○ Organize documents systematically using folders, subfolders, and naming conventions.

○ Keep track of document versions and revisions to ensure you're working with the latest version.

COLLABORATION & SHARING

○ Collaborate effectively with others by sharing files securely and selectively.

○ Use collaboration tools and platforms to facilitate communication & document sharing.

○ Establish clear guidelines and permissions for file sharing and collaboration.

Thank you!

MORE FREEBIES AT
CITY OF CREATIVE DREAMS